



Assessment & Oversight Tracking...Issues & Actions Management...Documentation & Evidence Tool

ORION Usage Overview

<https://orion.oro.doe.gov>

Last Updated: January 8, 2008

Purpose of ORION:

1. Planning and Tracking Oversight and Self-Assessment Activities (i.e., assessments, walkthroughs, and other oversight activities; issues; corrective actions)
2. Issues and Actions Management
3. Documentation and Evidence Tool
4. Data Repository with Trend Codes/Binning to Support Trending, Analysis, Rollups, and Reporting
5. Management Tool for Continuous Improvement

Accessing ORION:

ORION is available via any internet location at the following link:

<https://orion.oro.doe.gov>

To request access, please contact:

John Murmann (ORION System Administrator) at 865-576-1820 or email at murmannj@oro.doe.gov

or

Teresa Perry (DOE ORO ORION Sponsor) at 865-576-0831 or email perrytc@oro.doe.gov

Starting Points

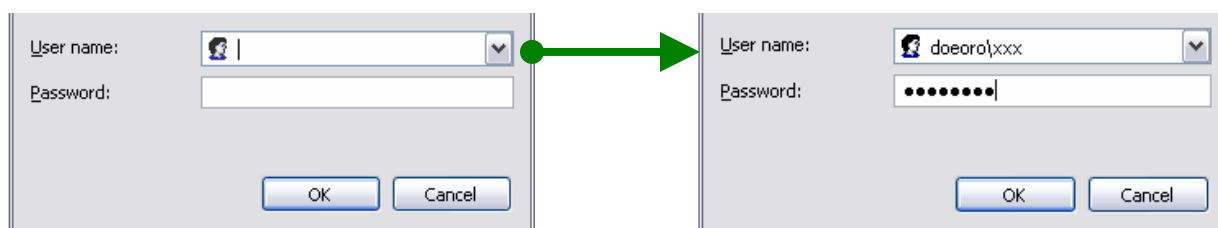
ORION Login and Internet Explorer helpful tips: *There are a few preliminary pieces of information that you need to know.* When you follow the ORION url as listed below to the title page, you will be asked to provide security login information. The login information is the same as your UCAMS ID. Also, in order to view some of ORION's screens, you will need to turn off the pop-up blocker in Internet Explorer.

1st The User Login Screen

To begin, open Internet Explorer, type in the following address: <https://orion.oro.doe.gov>, and click to go to this site. You will then see the ORION Login screen and be asked to enter the following information (shown below):

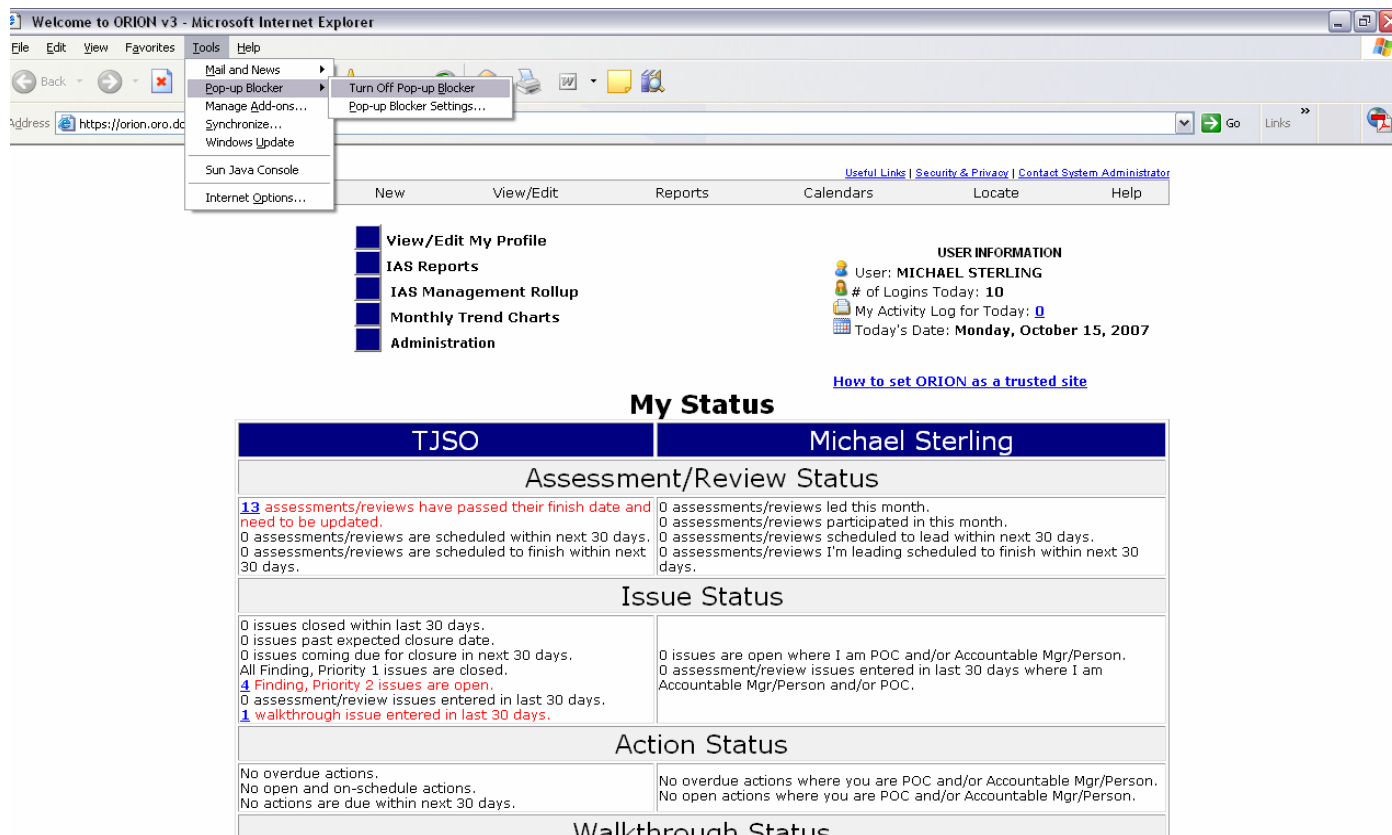
User name: = doeoro\User 3 character ID

Password: = User UCAMS password



2nd Setting Internet Explorer to allow pop-ups for ORION

After logging in, go to the browser's toolbar: (1) click "Tools," scroll to "Pop-up Blocker" and click "Turn off Pop-up Blocker." This gives you full functionality in ORION. A screenshot of this action is shown below:



Welcome to ORION v3 - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address <https://orion.oro.doe.gov> Go Links

Useful Links | [Security & Privacy](#) | [Contact System Administrator](#)

New View/Edit Reports Calendars Locate Help

View/Edit My Profile
IAS Reports
IAS Management Rollup
Monthly Trend Charts
Administration

USER INFORMATION
User: **MICHAEL STERLING**
of Logins Today: **10**
My Activity Log for Today: [0](#)
Today's Date: **Monday, October 15, 2007**

[How to set ORION as a trusted site](#)

My Status



TJSO	Michael Sterling
Assessment/Review Status	
13 assessments/reviews have passed their finish date and need to be updated. 0 assessments/reviews are scheduled within next 30 days. 0 assessments/reviews are scheduled to finish within next 30 days.	
0 assessments/reviews led this month. 0 assessments/reviews participated in this month. 0 assessments/reviews scheduled to lead within next 30 days. 0 assessments/reviews I'm leading scheduled to finish within next 30 days.	
Issue Status	
0 issues closed within last 30 days. 0 issues past expected closure date. 0 issues coming due for closure in next 30 days. All Finding, Priority 1 issues are closed. 4 Finding, Priority 2 issues are open. 0 assessment/review issues entered in last 30 days. 1 walkthrough issue entered in last 30 days.	
0 issues are open where I am POC and/or Accountable Mgr/Person. 0 assessment/review issues entered in last 30 days where I am Accountable Mgr/Person and/or POC.	
Action Status	
No overdue actions. No open and on-schedule actions. No actions are due within next 30 days.	
No overdue actions where you are POC and/or Accountable Mgr/Person. No open actions where you are POC and/or Accountable Mgr/Person.	
Walkthrough Status	

Personal Homepage

The ability to personalize your ORION Homepage: A snapshot of your organization's assessments and walkthroughs and your status as an assessor, point of contact (POC), and/or manager. Your ORION homepage has summary information that you need to track and trend your organization's data. To get set up to receive the full benefit of ORION, you must first perform a few preliminary actions. Below is the ORION homepage that has been set to show information for TJSO: See Chapter 2 of the *ORION User Manual* for more details.

The screenshot shows the ORION homepage with a navigation bar at the top containing links: Home, New, View/Edit, Reports, Calendars, Locate, and Help. A sidebar on the left lists several options, with 'View/Edit My Profile' circled in green. The main content area is titled 'My Status' and displays user information for Michael Sterling, including login statistics and today's date. Below this, there are several status sections: 'Assessment/Review Status', 'Issue Status', 'Action Status', 'Walkthrough Status', and 'Assessment Lessons Learned Status', each providing a summary of current and upcoming activities.

Setting your ORION Homepage is as easy as
"1, 2, 3"

1. Click "View/Edit My Profile" 
2. Fill in your role and organization info 
3. Tell ORION what you are interested in 











NOTE: Don't forget to click the **Save Edit** button when you are finished. Then press the **F5** key on your keyboard to refresh the homepage.

Auto-Notification from ORION








Step 3 above tells ORION that you want e-mail notifications on the selections you made in the VIEW/EDIT MY PROFILE screen. ORION can send you an e-mail weekly to quarterly telling you all you wish to know about your ORION entries. This feature provides a convenient reminder to help users stay in touch with status information.

This screenshot shows the 'View/Edit My Profile' screen with a red border. It contains several sections for user configuration. The 'Select all roles that apply to you:' section has checkboxes for 'Facility Representative, SME, SSO', 'Program/Project Manager', 'Manager, Team Leader', and 'Other' (which is checked). A 'Save Edit' button is in the top right. Below this are three dropdown menus for 'What sponsoring office applies to you?' (TJSO), 'Which organization are you associated with?' (TJSO), and 'Which site are you MOST associated with?' (TJNAF). The 'What project applies to you?' dropdown is partially visible. The bottom section, 'Would you like to receive email alerts when changes (e.g. Saves or Edits) are made to the IAS?', has radio buttons for 'No' and 'Yes' (selected). It also includes a section for 'Please choose which IAS updates you want to receive:' with checkboxes for 'My Office', 'My Site', 'My Org', 'I'm POC', 'I'm Team Lead or Team Member', and 'All' (selected). Further down, there are more radio buttons for 'Would you like to receive email notification reports?' (Yes selected) and a dropdown for 'What frequency would you like to receive the reports?' (Bi-Weekly selected). The bottom section, 'Select all notifications that you would like to receive: (Hold Down the CTRL key to select more than one)', features a list box with items like 'Overdue Actions', 'Reviews that Need Updating', and 'Reviews Starting in Next 30 Days by Team Lead'.

The following is an example of the ORION e-mail notification system:

Date: Tuesday			
	orion@oro.doe.gov	Overdue Actions for Point Of Contact - ORION Auto-Notification	Tue 10/9/2007 8:12 AM
	orion@oro.doe.gov	Overdue Actions for Responsible Person - ORION Auto-Notification	Tue 10/9/2007 8:12 AM
	orion@oro.doe.gov	ORO - All Open Finding, Priority 1 Issues - ORION Auto-Notification	Tue 10/9/2007 8:12 AM
	orion@oro.doe.gov	ORO - All Open Finding, Priority 2 Issues - ORION Auto-Notification	Tue 10/9/2007 8:12 AM
	orion@oro.doe.gov	ORO - All Overdue Actions - ORION Auto-Notification	Tue 10/9/2007 8:12 AM
	orion@oro.doe.gov	ORO - All Reviews that Need Updating - ORION Auto-Notification	Tue 10/9/2007 8:12 AM
	orion@oro.doe.gov	ORO - All On Schedule Actions - ORION Auto-Notification	Tue 10/9/2007 8:12 AM
	orion@oro.doe.gov	Open Issues for Point of Contact - ORION Auto-Notification	Tue 10/9/2007 8:12 AM
	orion@oro.doe.gov	Walkthroughs Completed this Month - ORION Auto-Notification	Tue 10/9/2007 8:12 AM
	orion@oro.doe.gov	Lessons Learned Entered in the Last 30 Days - ORION Auto-Notification	Tue 10/9/2007 8:12 AM

Not only will ORION help you stay on track with your commitments (above), but it will also send you e-mails when there are new entries to the Office of Science Integrated Assessment Schedule (SC-IAS) or any other schedules you wish to keep up to date with (below). Below is an example of ORION e-mail notifications sent out after edits were made to assessments on the SC-IAS.

Date: Last Week			
	orion@oro.doe.gov	All IAS Changes - ORION Auto-Notification	Fri 10/5/2007 9:25 AM 7 KB
	orion@oro.doe.gov	All IAS Changes - ORION Auto-Notification	Thu 10/4/2007 11:39 AM 7 KB
	orion@oro.doe.gov	All IAS Changes - ORION Auto-Notification	Wed 10/3/2007 4:16 PM 8 KB
	orion@oro.doe.gov	All IAS Changes - ORION Auto-Notification	Wed 10/3/2007 4:13 PM 9 KB
	orion@oro.doe.gov	All IAS Changes - ORION Auto-Notification	Wed 10/3/2007 4:07 PM 7 KB
	orion@oro.doe.gov	All IAS Changes - ORION Auto-Notification	Wed 10/3/2007 4:03 PM 8 KB
	orion@oro.doe.gov	All IAS Changes - ORION Auto-Notification	Wed 10/3/2007 1:46 PM 8 KB

All IAS Changes - ORION Auto-Notification

orion@oro.doe.gov

To: Sterling, Michael A

IAS Edits/Changes for REV-MJS-11-29-2006-9858 on 10/3/2007				
Change Date	Changed By	Field	Old Value	New Value
10/3/2007 1:45:30 PM	Michael Sterling	Site		BNL
10/3/2007 1:45:30 PM	Michael Sterling	Actual Finish Date		6/15/2007
10/3/2007 1:45:30 PM	Michael Sterling	Assessment Category		Independent
10/3/2007 1:45:30 PM	Michael Sterling	Actual Start Date		6/15/2007
10/3/2007 1:45:30 PM	Michael Sterling	Completed?	No	Yes

This email was generated automatically by [ORION](#). Please do not reply to this email.

If you do not wish to receive this email in the future, please update your profile in ORION.

In this example, the ORION e-mail notification contains a table showing the changes made to an assessment on the SC-IAS. The user is notified as soon as the assessment is edited and saved. Here it appears that an assessment has been marked complete with a date of completion 6/15/2007.

Search and Locate

The ORION Locate Feature: *Search the database whether you know the identification number or not!* ORION has the capability to perform a text search. Example: You need to edit a walkthrough you entered and you can't remember the walkthrough ID#. Simply search for a keyword/phrase that is applicable to your walkthrough. See Chapter 2 of the *ORION User Manual* for more details.



The screenshot shows the ORION system interface. At the top, there is a navigation bar with links: Home, New, View/Edit, Reports, Calendars, **Locate**, and Help. Below the navigation bar, there is a sidebar with a list of links: View/Edit My Profile, IAS Reports, IAS Management Rollup, Monthly Trend Charts, and Administration. In the center, there is a user profile section for Michael Sterling, showing his login history and the current date: Friday, October 12, 2007. To the right, there is a search form with a dropdown menu for 'Category to Search' (set to 'Assessments/Reviews'), a text input for 'Search Text', and a 'Search' button. A green arrow points to the 'Find Record Word/Phrase Search' button. Below the search form, there is a checkbox for 'Exact Matches Only'.

My Status

TJSO	Michael Sterling
Assessment/Review Status 13 assessments/reviews have passed their finish date and need to be updated. 0 assessments/reviews are scheduled within next 30 days. 0 assessments/reviews are scheduled to finish within next 30 days.	
Issue Status 0 issues closed within last 30 days. 0 issues past expected closure date. 0 issues coming due for closure in next 30 days. All Finding, Priority 1 issues are closed. 4 Finding, Priority 2 issues are open. 0 assessment/review issues entered in last 30 days. 1 walkthrough issue entered in last 30 days.	
Action Status No overdue actions. No open and on-schedule actions. No actions are due within next 30 days.	
Walkthrough Status 6 walkthroughs completed in last 30 days.	
Assessment Lessons Learned Status No lessons learned entered on assessments or issues mgmt in the last 30 days. 5 lessons learned on assessments or issues mgmt.	

Please enter the following information you would like to search for. Please note that searches across "All" categories will take slightly longer than other searches.

Category to Search: Walkthroughs

Search Text: WICS

☐ Exact Matches Only

1 records found. This search took 0.07 seconds.

	ID #	Category	Subject	Percent
View/Edit	WALK-4TP-9/21/2007-40889	Walkthroughs	Waste Inventory Control System (WICS) Familiarization Walkthrough of the TWPC Contact Handled (CH) Waste Storage Facility	100%
1				

Example: Above is a search performed on all walkthroughs that contain the acronym "WICS." ORION quickly searches all entry fields for WICS. When ORION finds walkthroughs with WICS, it lists them in a table for you to view. To view or edit the walkthrough you wanted, simply click the **View/Edit** button for access.

Enter a New Walkthrough

ORION user-friendly creation layout "New": *This is an intuitive form for creating assessments, walkthroughs, corrective actions, and issues.* To create a new walkthrough, simply input the following fields and click Save. User information, date, and walkthrough ID# are automatically generated for you. See Chapter 5 of the *ORION User Manual* for more details.

ORION version 3

Useful Links | Security & Privacy | Contact System Administrator

Home New View/Edit Reports Calendars Locate Help

Assessment/Review
Walkthrough
Lessons Learned
Facilities Mgmt Team
Monthly Trend Charts
Administration

My Status

TJSO **Michael Sterling**

Assessment/Review Status

13 assessments/reviews have passed their finish date and need to be updated.
0 assessments/reviews are scheduled within next 30 days.
0 assessments/reviews are scheduled to finish within next 30 days.

Issue Status

0 issues closed within last 30 days.
0 issues past expected closure date.
0 issues coming due for closure in next 30 days.
All Finding, Priority 1 issues are closed.
4 Finding, Priority 2 issues are open.
0 assessment/review issues entered in last 30 days.
1 walkthrough issue entered in last 30 days.

Action Status

No overdue actions.
No open and on-schedule actions.
No actions are due within next 30 days.

Walkthrough Status

6 walkthroughs completed in last 30 days.
1 walkthrough completed in last 30 days.

Assessment Lessons Learned

No lessons learned entered on assessments or issues mgmt in the last 30 days.
5 lessons learned on assessments or issues mgmt.

ORION version 3

Useful Links | Security & Privacy | Contact System Administrator

Home New View/Edit Reports Calendars Locate Help

Walkthrough: Entry Screen (Fields in red are required)

This bar displays status information for the page.

Walkthrough #
WALK-MSV-10/12/2007-80873

Date of Event*
10/12/2007

Site*
TJNAF

Org*
TJSO

Assessor*
Abbott, Kim

Contractor*
Select a Functional Area

Project
Select a Project

Sub Project
Select a Sub Project

Functional Area
Select a Functional Area

Sub Area
Select a Sub Area

Facility Search
Search Reset

Facility
Select a Facility

DOE Program Manager
Select a Program Manager

Date Entered
10/12/2007

Entered By
Michael Sterling

Trend Team Validated
Select a Trend Team

Subject/Activity/Title*
Example Walkthrough

Description(Summary of activity/work observed)
Enter description here

Any issues observed?
No

Select Issue Type to add?
P3 (Trend Only) P2 P1 Proficiency

0 Issues associated with this walkthrough.

Save Add Attach Copy Walkthrough History Report Add Lesson Email

Add a Priority 3 Issue to a Walkthrough

To add an issue to a walkthrough, you must have the browser's pop-up blocker turned off (described on page 2). After entering the walkthrough information, click the **Save Edit** button after making sure that the "Any Issues observed?" dropdown box contains a "Yes" (as shown below). **Note: You must save the walkthrough information before you can add the issue information.** Now that you have saved the walkthrough record, add a Priority 3 issue by clicking next to "P3 (Trend Only)" located below "Select Issue Type to add?" (shown below circled in red). The moment you click the P3 circle, the PRIORITY 3 FINDING SHORT FORM will appear as a pop-up (shown below, right). Fill in the applicable information and click the **Save** button.

The image displays two screenshots of the ORION v3 web application interface. The left screenshot shows the 'Walkthrough: Entry Screen' with a red circle highlighting the 'Select Issue Type to add?' section, where 'P3 (Trend Only)' is selected. The right screenshot shows the 'Priority 3 Finding Short Form' pop-up, which is a detailed form for adding a finding to the selected walkthrough. The form includes fields for 'Date of Event', 'Walkthrough ID', 'P3 Finding ID', 'Choose a Functional Area', 'Short statement of P3 Finding', 'Description', 'ISM Function', 'Functional Sub Area', and 'Facility'. A red arrow points from the 'P3 (Trend Only)' option in the left screenshot to the 'Priority 3 Finding Short Form' pop-up on the right.

Click P3 for pop-up form

View/Edit your New Walkthrough

ORION "View/Edit" Feature: Now that you have created the walkthrough record, you can use this feature to easily view and edit the information at any time and as many times as you like.

The screenshot displays the ORION system interface. On the left, a navigation menu includes 'View/Edit M', 'IAS Reports', 'IAS Manage', 'Monthly Tre', and 'Administratio'. A dropdown menu for 'View/Edit M' is open, showing options: 'Assessment/Review Issue', 'Corrective Action', 'Walkthrough', 'Lessons Learned', 'Facilities List', 'Project List', and 'Facilities Mgmt Team'. A green arrow points from the 'Walkthrough' option to the 'Walkthroughs' standard view on the right.

The 'Walkthroughs' standard view is shown with the following filters:

- Site: TJNAF
- Organization: TJSO
- Facility: (empty)
- Assessor: (empty)
- Completed Between: Start: 1/1/2007, Finish: 9/30/2007

Below the filters, there is a 'View' button and a 'Printer Friendly Version' link. A 'Save' button is also present.

The main table displays the following data:

	Walkthrough #	Subject	Completed	Site	Facility	Lead Org	Assessor
View/Edit	WALK-CJB-5/18/2007-33796	Status of the fall protection corective actions from the August 28-31 Assistance Visit on Control of Hazardous Energy - Lockout Tagout and Fall Protection at Thomas Jefferson National Laboratory	5/18/2006	TJNAF		TJSO	Craven, James
View/Edit	WALK-CJB-5/18/2007-95645	Evaluate Status corrective actions from the Hoisting and Rigging Incident Investigation Report from the tool box drop October 24, 2006	5/18/2007	TJNAF		TJSO	Craven, James
View/Edit	WALK-QA7-4/17/2007-13105	Oxygen Deficient Hazards	4/17/2006	TJNAF		TJSO	Takacs, Tony
View/Edit	WALK-QA7-4/18/2007-66959	Confined Space Review	4/18/2007	TJNAF		TJSO	Takacs, Tony
View/Edit	WALK-QA7-4/18/2007-85547	Follow Up on Incident Investigation Report Nitrogen Gas Release in Test Lab QA Room on June 3-5, 2006 Follow Up Actions	4/18/2007	TJNAF		TJSO	Takacs, Tony
View/Edit	WALK-QA7-8/2/2007-89063	Ergonomics	8/2/2007	TJNAF		TJSO	Takacs, Tony

Enter a New Assessment

ORION user-friendly creation layout "New": This is an intuitive form for creating assessments, walkthroughs, corrective actions, and issues. To create a new assessment, simply input the following fields and click Save. User information, date, and assessment ID# are automatically generated for you. See Chapter 4 of the *ORION User Manual* for more details.

The screenshot displays the ORION system interface. On the left, a sidebar menu is visible with options: Home, New, View/Edit, Reports, Calendars, Locate, and Help. The 'New' menu is expanded, showing sub-options: Assessment/Review, Walkthrough, Lessons Learned, Facilities Mgmt Team, Monthly Trend Charts, and Administration. An orange arrow points from the 'Assessment/Review' option to the main content area.

The main content area is titled 'ASSESSMENT/REVIEW DATA ENTRY SCREEN'. It features a navigation bar with the same options as the sidebar. Below the navigation bar, a user information section displays: User: MICHAEL STERLING, # of Logins Today: 20, My Activity Log for Today: 7, and Today's Date: Friday, October 12, 2007.

The main form area is titled 'ASSESSMENT/REVIEW DATA ENTRY SCREEN' and contains a message: 'Please enter the following information related to the assessment/review (Fields in red are required)'. The form includes several sections:

- Review #**: REV-MSV-10/12/2007-93115
- Organization Performing the Review***: TJSO
- Office***: TJSO
- Subject/Title* (Scope of Review)**: (Empty text area)
- Planned Start Date***: (Empty date field)
- Actual Start Date**: (Empty date field)
- Add Issue? (*Review must be complete before adding issues.)**: Radio buttons for P3 (Trend Only), P2, P1, and Proficiency.
- Status Completed?**: No
- Is this review part of the Site Integrated Assessment Schedule?**: No
- Point of Contact***: (Empty dropdown)
- Organization Being Reviewed***: TJSO
- Site/Plant**: TJNAF
- Justification for Date Change: (Required for IAS Reviews, Optional for Other Review Types)**: (Empty text area)
- Planned Finish Date***: (Empty date field)
- Actual Finish Date**: (Empty date field)
- Issues associated with this Review. (Click the number to the left to view issues)**: 0
- Driver**: (Empty text field)
- Type of Review**: (Empty dropdown)
- Assessment Category**: Independent
- Trend Team Validated**: (Empty text field)

At the bottom of the form, there are buttons for 'Save', 'Add Attachments', 'Add Lesson', 'Copy Assessment', 'History', 'Printable', 'Email', and 'Review & All Associated Items'.

View/Edit your New Assessment

ORION "View/Edit" Feature: Now that you have created the assessment, you can use this feature to easily view and edit/update the information at any time and as many times as you like.

The screenshot displays the ORION system interface. At the top, a navigation bar includes links for Home, New, View/Edit, Reports, Calendars, Locate, and Help. A dropdown menu for 'View/Edit' is open, showing options like 'Assessment/Review', 'Issue', 'Corrective Action', 'Walkthrough', 'Lessons Learned', 'Facilities List', 'Project List', and 'Facilities Mgmt Team'. A green arrow points from the 'Assessment/Review' option to the 'Assessments/Reviews' page below.

The 'Assessments/Reviews' page features a header with the ORION logo and navigation links. Below the header, there's a section for 'Standard Views for Assessments/Reviews' with a dropdown menu set to 'View Open Reviews Only' and a 'Set as Default' button. A 'Filtered Search for Assessments/Reviews' section includes fields for Site (TJNAF), Organization Reviewed (TJSO), Completed? (Yes), Point of Contact, and date ranges (Start/Finish). A 'View' button and a 'Printer Friendly Version' link are also present. Below the search filters, a message states: 'Choose from one or more of the picklists above to filter the list then click the 'View' button.' A 'Save' button is located at the bottom of the search section.

The main content area displays a table of assessments/reviews. The table has columns for Review #, Subject, Planned Start, Planned Finish, Completed?, Site, Org Reviewed, and POC. Each row includes a 'View/Edit' button next to the Review #.

	Review #	Subject	Planned Start	Planned Finish	Completed?	Site	Org Reviewed	POC
View/Edit	REV-4TP-11/6/2006-49109	FPD 12GeV Project Status Review	12/1/2006	1/1/2007	Yes	TJNAF	TJSO	May, Joe
View/Edit	REV-4TP-8/29/2006-23918	Business Administration Enclave	5/7/2007	5/8/2007	Yes	TJNAF	TJSO	Bethea, Andre
View/Edit	REV-4TP-8/29/2006-38216	Vulnerability Scanning Management	1/12/2007	1/17/2007	Yes	TJNAF	TJSO	Bethea, Andre
View/Edit	REV-N3B-8/30/2006-3551	NFPA 70E Compliance	6/18/2007	6/22/2007	Yes	TJNAF	TJSO	Neilson, Steve
View/Edit	REV-N3B-8/30/2006-64154	Comprehensive Financial Management System Baseline Review	1/2/2007	7/31/2007	Yes	TJNAF	TJSO	Payne, Jeffrey
View/Edit	REV-N3B-8/31/2006-58171	12GeV Mini-Project Review	12/1/2006	12/31/2006	Yes	TJNAF	TJSO	May, Joe
View/Edit	REV-QZP-8/25/2006-99983	ISA - A-123 Validation Review	7/1/2007	8/31/2007	Yes	TJNAF	TJSO	Reed, Tom
View/Edit	REV-SVF-2/5/2007-74928	TJSO ISMS Self Assessment	3/20/2007	3/23/2007	Yes	TJNAF	TJSO	Neilson, Steve
View/Edit	REV-SVF-2/5/2007-83288	Directed Review of JLAB ISMS Self Assessments	3/20/2007	3/22/2007	Yes	TJNAF	TJSO	Neilson, Steve

ORION Calendar of Assessments


One often-used feature in ORION is the assessment calendar interface. This feature allows the user to view a monthly calendar that is populated with all the assessments for their respective organization. Each day of the month contains the assessments that are being conducted by your organization. Click on the date as shown below to link to the assessment record. ORION users have found this feature very helpful in managing their assessment, action, and walkthrough schedules. See Chapter 2 of the *ORION User Manual* for more details.

The screenshot displays the ORION Assessment Calendar interface. The top navigation bar includes links for Home, New, View/Edit, Reports, Calendars, Locate, and Help. The sidebar on the left contains a 'My Status' section with links for View/Edit My Profile, IAS Reports, IAS Management Rollup, Monthly Trend Charts, and Administration. The main content area shows the 'Assessment Calendar' for October 2007, with 3 reviews of TJSO scheduled for 10/12/2007. The calendar table below shows the schedule for each day of the month.

Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	1 IG Review of Conferences Sponsored by Office of Science Material Handling & Rigging Energy Management Performance JSA - Biennial Review of Prices Charged for Materials and Services	2 IG Review of Conferences Sponsored by Office of Science Material Handling & Rigging Energy Management Performance JSA - Biennial Review of Prices Charged for Materials and Services	3 IG Review of Conferences Sponsored by Office of Science Material Handling & Rigging Energy Management Performance JSA - Biennial Review of Prices Charged for Materials and Services	4 IG Review of Conferences Sponsored by Office of Science Material Handling & Rigging Energy Management Performance JSA - Biennial Review of Prices Charged for Materials and Services	5 IG Review of Conferences Sponsored by Office of Science Material Handling & Rigging Energy Management Performance JSA - Biennial Review of Prices Charged for Materials and Services	6
7	8 IG Review of Conferences Sponsored by Office of Science Energy Management Performance JSA - Biennial Review of Prices Charged for Materials and Services	9 IG Review of Conferences Sponsored by Office of Science Energy Management Performance JSA - Biennial Review of Prices Charged for Materials and Services	10 IG Review of Conferences Sponsored by Office of Science Energy Management Performance JSA - Biennial Review of Prices Charged for Materials and Services	11 IG Review of Conferences Sponsored by Office of Science Energy Management Performance JSA - Biennial Review of Prices Charged for Materials and Services	12 IG Review of Conferences Sponsored by Office of Science Energy Management Performance JSA - Biennial Review of Prices Charged for Materials and Services	13
14	15 IG Review of Conferences Sponsored by Office of Science Energy Management Performance JSA - Biennial Review of Prices Charged for Materials and Services	16 IG Review of Conferences Sponsored by Office of Science Energy Management Performance JSA - Biennial Review of Prices Charged for Materials and Services	17 IG Review of Conferences Sponsored by Office of Science Energy Management Performance JSA - Biennial Review of Prices Charged for Materials and Services	18 IG Review of Conferences Sponsored by Office of Science Energy Management Performance JSA - Biennial Review of Prices Charged for Materials and Services	19 IG Review of Conferences Sponsored by Office of Science Energy Management Performance JSA - Biennial Review of Prices Charged for Materials and Services	20

Integrated Assessment Schedule (IAS) Reports

Click here to view the IAS for Science, site-specific, and organization level. Just enter in the dates and office you are interested in and click the button. ORION allows you to view assessments performed by your organization and assessment being performed on your organization. See Chapter 3 of the *ORION User Manual* for more details.



Home New View/Edit Reports Calendars Locations

[Useful Links | Security & Privacy |](#)

View/Edit My Profile
IAS Reports
IAS Management Rollup
Monthly Trend Charts
Administration

USER INFORMATION
User: MICHAEL STERLING
of Logins Today: 20
My Activity Log for Today
Today's Date: Friday, Oct 12, 2007

[How to set ORION as a taskbar icon](#)

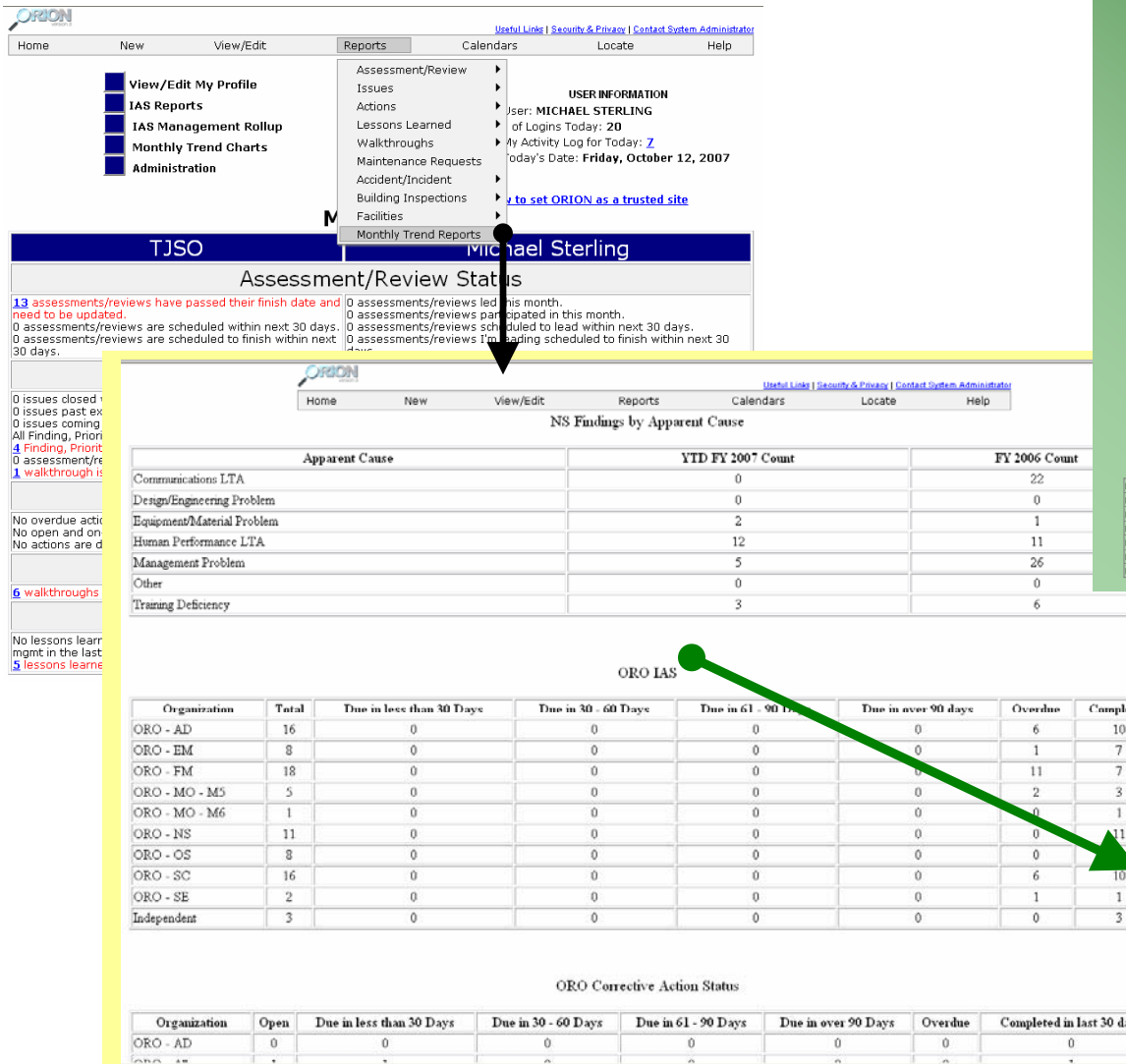
My Status

TJSO	Michael Sterling
Assessment/Review Status	
13 assessments/reviews have passed their finish date and need to be updated. 0 assessments/reviews are scheduled within next 30 days. 0 assessments/reviews are scheduled to finish within next 30 days.	
Issue Status	
0 issues closed within last 30 days. 0 issues past expected closure date. 0 issues coming due for closure in next 30 days. All Finding, Priority 1 issues are closed. 4 Finding, Priority 2 issues are open. 0 assessment/review issues entered in last 30 days. 1 walkthrough issue entered in last 30 days.	
Action Status	
No overdue actions. No open and on-schedule actions. No actions are due within next 30 days.	
Walkthrough Status	
6 walkthroughs completed in last 30 days.	
Assessment Lessons Learned Status	
No lessons learned entered on assessments or issues mgmt in the last 30 days. 5 lessons learned on assessments or issues mgmt.	

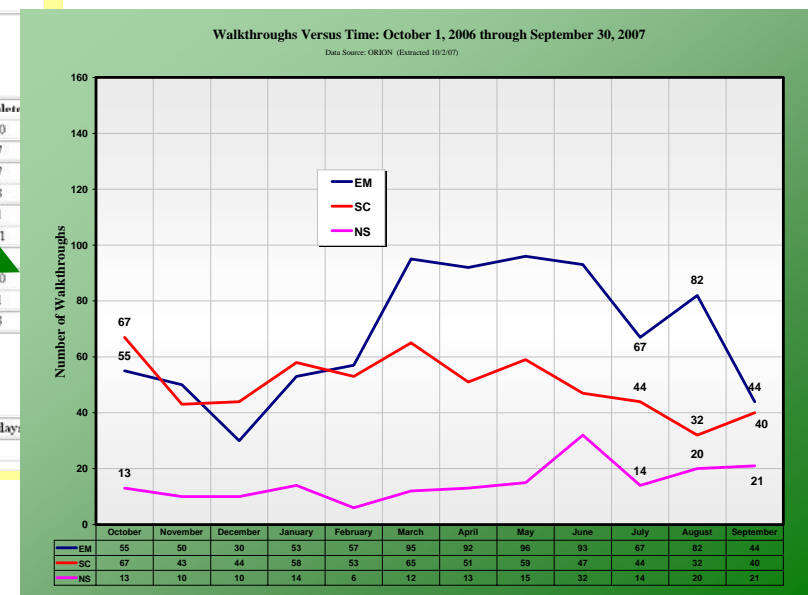
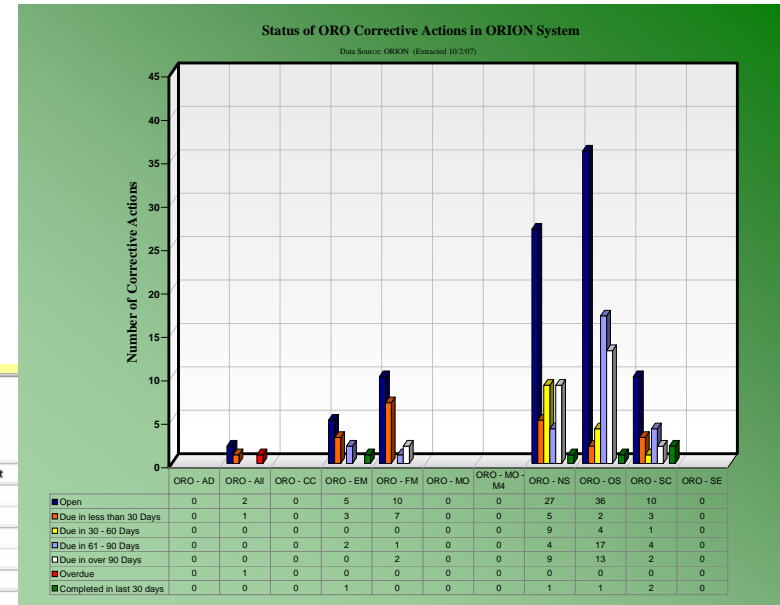
SC-IAS Reports	
Start: 1/1/2007 Finish: 9/30/2007 Office: TJSO	SC IAS Wall Chart - Field Reviews Only [Date Filtered] (SC-IAS Reviews performed on the organization)
Fiscal Year: 2008 Office: TJSO	* SC Integrated Assessment Schedule (SC-IAS Reviews performed both on and by the organization)
Org Being Reviewed: TJSO	FY08-10 SC Integrated Assessment Schedule (SC-IAS Reviews performed on the organization) **Use this report to generate the SC-IAS input to the SC Annual Performance Plan.
Site IAS Reports	
Fiscal Year: 2008 Office: TJSO	* Site Integrated Assessment Schedule (IAS Reviews performed both on and by the organization) **This report is used to generate the War Room charts.
Fiscal Year: 2008 Office: TJSO	Site Integrated Assessment Schedule (IAS Reviews performed on the organization - includes SC-IAS)
Organization Being Reviewed: TJSO	FY08-10 Site Integrated Assessment Schedule (Site IAS Reviews performed on the organization)
Organizational Assessment Reports	
Organization Being Reviewed: TJSO Year: 2008	* FY Schedule of All Assessments by Month (Includes SC-IAS, Site IAS and non-IAS Reviews)
Start: 1/1/2007 Finish: 9/30/2007 Organization Being Reviewed: TJSO Select IAS level: SC-IAS	IAS Levels & User-selected date range (Filtered by Org; Grouped by Site/Org and Sorted by Planned Start Date)
Start: 1/1/2007 Finish: 9/30/2007 Org Being Reviewed/Performing Review: TJSO Select IAS level: SC-IAS	* IAS Levels & User-selected date range (Filtered by Org; Grouped by Functional Area and Sorted by Planned Start Date)

Trending Capabilities

ORION data is stored on a server-based database so that data can be easily extracted for trending purposes. At any time, you can take a "snapshot" of how your organization is performing. Below you can see some of the data from ORO that has been set up as a special report (not viewable to general user). This feature allows your organization to quickly view the data from which many trending opportunities are available. The graphs show recent trending charts used in ORO's quarterly trending report. See Chapter 3 of the *ORION User Manual* for more details.



Currently set for ORO but can be easily adjusted for other offices.



Custom Reports designed with your facility in mind

Given that ORION is a custom application, it can be tailored to fit an organization's needs. ORO Facility Representatives have taken advantage of ORION's customization capabilities. In the following example, you can see the entry form (draft) on the left for the Facility Representative Report that can be saved and reopened at the user's discretion. To the right, you can see the finished report that can be e-mailed or printed for monthly oversight purposes. The yellow indicates entry fields. See Chapter 3 of the *ORION User Manual* for more details.

Facility Representative Monthly Report

Fac Rep Name:

Start (mm/dd/yyyy):

Finish (mm/dd/yyyy):

Get Info Clear Screen Return

Report ID: FRR-SD9-7/10/2007-50840

Date Created: 7/10/2007

Created By: Robert Stroud

Report covers month: and year:

Report Title:

Percent (%) Time in Field (Goal, Greater than 40 %):

Percent (%) Time Spent on Oversight Activities (Goal, Greater than 65 %):

List/Describe Oversight Activities

Activities Summary

Conducted daily technical oversight of BJC Management processes and work activities related to the D/B of Buildings K-15 and 27.

Major oversight activities include reviewing:

- BJC equipment segmentation and removal of BJC material
- P.O. stock removal
- Vent, purge and drain activities on process gases systems
- Internal visual inspection of process gases components

Walkthroughs and/or Assessments Activities and Issues (Read Only)

*Note: The contents of this textbox will not appear in the final report submittal unless selected contents are copied and pasted into the textboxes above or below.

WALKTHROUGH ACTIVITIES

1. (WALK-CFR-6/26/2007-76718) Walk down of K-25 building to review the (Corbel and Beam repair) operations in the east side vaults.

Description: We reviewed two work areas, which includes the structural repairs, tools, equipment and work materials. ID: 1117.

List/Describe Issues and/or Concerns

See list below.

Use the links below to view walkthroughs/assessments performed or attended.

WALK-CFR-6/26/2007-76718 - Walk down of K-25 building to review the (Corbel and Beam repair) operations in the east side vaults.

WALK-KOK-6/19/2007-92598 - Walk down of K-25 building to review ongoing hot work in vault 306-2. WP: 1615.

WALK-KOK-6/19/2007-7176 - BJC workers were in the process of performing hot work on tube oil plasma systems in vault 306-2. The hot work permit referred to an email for additional instructions, the instructions stated not to do.

WALK-CFR-6/14/2007-89180 - Walk down of K-25 building to review the (Waste Pack) operations in the 312 area.

WALK-CFR-6/14/2007-92170 - BJC was using a track-hoe with a shear attachment and attempting to load process gas valves into a 51-99 box. A splitter was standing within one foot of the box and within three feet of the suspended L.

Meetings Attended: (Date Time and Meeting Topic)

Approximately 25 meetings were attended.

Occurrence Reports Reviewed: (Number and Title)

Approved report: ER-GR0-BJC-R15EN/RES-2007-0007 Near Miss - Piece of Sheet Metal Fall.

Select the people you want to email your report to:

Abbott, Kim
Adler, David
Aiken, Philip
Albaugh, Wayne
Allen, David
Allen, Terry
Amos, Deborah

Howard, Jack
Mullis, John
Nose, Timothy
Farler, Charles
Stroud, Robert

States: ☒ Draft ☐ Final

Last Edited: 7/11/2007

Last Edited By: Robert Stroud

Email Save Edit Attachments Copy History Printable

Facility Representative Monthly Report - June 2007

Fac Rep: Bailey, William

Report Date: 10/11/2007

Report Month and Year: June 2007

Status: Final

Percent (%) Time in Field: 25

Percent (%) Time Spent on Oversight: 35

Activities:

Oversight Activities: Supported Procurement & Contracts Division

-Served as an EM representative on a Source Evaluation Board (SEB)

Issues/Concerns: 1-BJC has completed changes to the Vent and Sample (V&S) ALARA Review and RWP removing the CAAM requirement, and associated equipment. See ORION Issue (ISS-M72-6/12/2007-65325).

Walkthroughs/Assessments(Performed or Attended):

Meetings Attended: -Procurement & Contract Division (P&CD) Meetings

-BJC/WESKEM Plan of the Day (POD) Meetings

Occurrence Reports Reviewed: None.

Documents Reviewed: Work Packages:

MVSWSF's DSA and TSR, CFRs, and DOE Orders

WP06-LWX 236S Move CH-TRU Containers from WESKEM to Foster Wheeler L7B082

WP06-LWX 238KKK Moved Purged Drums between Drum Processing Area and 7879

WP06-LWX238 Rev. 3

WP06-LWX 238LLL Moved Purged Drums between Drum Processing Area and 7879

WP06-LWX238 Rev. 3

WP07-LWX 377 Received MW Containers from Energy Solutions and Take to Storage at 7654

WP06-LWX 238MMM Moved Purged Drums between Drum Processing Area and 7879

WP6-LWX238 Rev. 3

WP07-LWX 375 Pick-up UTB-LLW and Transport to ETTP

Training Attended: None.

Email Distribution: Jackson, Dean

Report ID: FRR-Q9E-7/11/2007-69887

Report Created: 7/11/2007

Entered By: William Bailey

☐ Draft ☒ Final

*To edit a report, you must select "Draft" status.

Email Add Attach History

Example Functional Areas and Subareas for Use in (1) Identifying Functional Areas covered during assessments and walkthroughs and (2) Trending Findings

The list on the following page provides typical functional areas (in bold font) and further breakdown for some of the functional areas into subareas for use in describing what areas are covered in an assessment or walkthrough. The same list of functional areas/subareas is also used to categorize/trend findings that may be identified during an assessment or walkthrough. (For example: An Operational Readiness Review (ORR) may cover several functional areas, such as conduct of operations, emergency management, maintenance, industrial safety, industrial hygiene, quality assurance, etc. Findings from the ORR would be in a particular functional area/subarea, such as Industrial Safety- Hoisting and Rigging/Cranes. Other findings may be in Quality Assurance- Personnel Training & Qualification.)

Note: In order to be effective, trend codes should be consistently applied, and the number of trend codes should be limited. The following list was updated December 6, 2007.

- **Business Operations**
 - Administration
 - Financial Management
 - Human Resources
 - Procurement & Contract Mgmt
 - Small Business
- **Conduct of Operations**
 - Communications
 - Control Area Activities
 - Control of Equipment and System Status
 - Control of On-Shift Training
 - Equipment and Piping Labeling
 - Independent Verification
 - Investigation of Abnormal Events
 - Lockouts and Tagouts
 - Logkeeping
 - Notifications
 - Operations Aspects of Facility Chemistry
 - Operations Organization and Admin.
 - Operations Procedures
 - Operations Turnover
 - Operator Aid Postings
 - Required Reading
 - Shift Routines and Operating Practices
 - Timely Orders to Operators
- **Configuration Management**
- **Diversity Programs**
- **Emergency Management**
- **Engineering**
- **ES&H - Accelerator Safety Basis**
- **ES&H - Criticality Safety**
- **ES&H - Environmental – Environmental Compliance**
 - Air Effluent Management
 - Water Effluent Management
 - Environmental Monitoring
 - NEPA
 - Environmental Management Systems
 - Toxic Substances Management
 - Green Buildings & Sustainable Design
 - Vehicle Fleet Management
- **ES&H – Environmental – Waste Management**
 - Hazardous Waste Management
 - Radioactive Waste Management
 - Solid Waste Management & Pollution Prevention
- Energy & Water Usage Management
- Affirmative Procurement
- **ES&H - Fire Protection**
 - Fire Department/Emergency Response
 - Fire Suppression/Detection Systems
 - Hazards Identification and Control
 - Inspection, Testing and Maintenance
 - Life Safety/Facility Egress
 - Fire Hazards Analysis
- **ES&H - Industrial Hygiene**
 - Biohazards
 - Bloodborne Pathogens
 - Chemical Safety
 - Confined Space
 - Ergonomics
 - Eyewash/Eyewash Station
 - Hazard Communication
 - HAZWOPER
 - Laboratory Standard
 - Laser Safety
 - Noise/Hearing Conservation
 - Nonionizing Radiation
 - Occupational Health/Medicine
 - Respiratory Protection
 - Thermal Stresses
 - Toxic and Hazardous Substances
 - Ventilation/Local Exhaust
- **ES&H - Construction & Industrial Safety**
 - Compressed Gases
 - Electrical
 - Excavation/Trenching
 - Fall Protection
 - Hand and Power Tools
 - Heavy Equipment
 - Hoisting and Rigging/Cranes
 - Housekeeping/Storage
 - Lighting
 - Machine Guarding
 - Materials Handling
 - Personal Protective Equipment
 - Powered Industrial Equipment
 - Recordkeeping
 - Scaffolding
 - Stairways/Ladders
 - Walking/Working Surfaces
 - Welding/Cutting
- **ES&H - Nuclear Safety Basis**
- **ES&H - Radiation Protection**
 - ALARA
 - Area Monitoring
- Dosimetry
- Plans & Procedures
- Radiological Controls
- Records & Reports
- **Information Technology (IT)**
 - Cyber Security
- **ISM (General)**
- **Maintenance**
- **Packaging and Transportation**
- **Project Management**
- **Property Management**
- **Quality Assurance**
 - Program
 - Personnel Training & Qualification
 - Quality Improvement
 - Documents & Records
 - Work Processes
 - Design
 - Procurement
 - Inspection & Acceptance Testing
 - Management Assessment
 - Independent Assessment
 - Safety Software Quality
 - Suspect/Counterfeit Items
- **Safeguards and Security/ISSM**